

# Annual Performance Report HOME Program

U.S. Department of Housing  
and Urban Development  
Office of Community Planning  
and Development

OMB Approval No. 2506-0171  
(exp. 05/31/2007)

Public reporting burden for this collection of information is estimated to average 2.5 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. This agency may not conduct or sponsor, and a person is not required to respond to, a collection of information unless that collection displays a valid OMB control number.

The HOME statute imposes a significant number of data collection and reporting requirements. This includes information on assisted properties, on the owners or tenants of the properties, and on other programmatic areas. The information will be used: 1) to assist HOME participants in managing their programs; 2) to track performance of participants in meeting fund commitment and expenditure deadlines; 3) to permit HUD to determine whether each participant meets the HOME statutory income targeting and affordability requirements; and 4) to permit HUD to determine compliance with other statutory and regulatory program requirements. This data collection is authorized under Title II of the Cranston-Gonzalez National Affordable Housing Act or related authorities. Access to Federal grant funds is contingent on the reporting of certain project-specific data elements. Records of information collected will be maintained by the recipients of the assistance. Information on activities and expenditures of grant funds is public information and is generally available for disclosure. Recipients are responsible for ensuring confidentiality when public disclosure is not required.

This form is intended to collect numeric data to be aggregated nationally as a complement to data collected through the Cash and Management Information (C/MI) System. Participants should enter the reporting period in the first block. The reporting period is October 1 to September 30. Instructions are included for each section if further explanation is needed.

Submit this form on or before December 31. Send one copy to the appropriate HUD Field Office and one copy to: <b>HOME Program, Rm 7176, 451 7th Street, S.W., Washington D.C. 20410</b>	This report is for period (mm/dd/yyyy) Starting 04/01/2004	Ending 03/31/2005	Date Submitted (mm/dd/yyyy)
-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	------------------------------------------------------------------	----------------------	-----------------------------

## Part I Participant Identification

1. Participant Number M04-SG-01-0100	2. Participant Name State of Alabama (administered by Alabama Housing Finance Authority)		
3. Name of Person completing this report Earlene Hayden		4. Phone Number (Include Area Code) 334 244-9200	
5. Address 2000 Interstate Park Drive, Suite 408	6. City Montgomery	7. State AL	8. Zip Code 36109

## Part II Program Income

Enter the following program income amounts for the reporting period: in block 1, enter the balance on hand at the beginning; in block 2, enter the amount generated; in block 3, enter the amount expended; and in block 4, enter the amount for Tenant-Based rental Assistance.

1. Balance on hand at Beginning of Reporting Period 0	2. Amount received during Reporting Period \$6767.20	3. Total amount expended during Reporting Period \$6767.20	4. Amount expended for Tenant-Based Rental Assistance 0	5. Balance on hand at end of Reporting Period (1 + 2 - 3) = 5 0
----------------------------------------------------------	---------------------------------------------------------	---------------------------------------------------------------	------------------------------------------------------------	--------------------------------------------------------------------

## Part III Minority Business Enterprises (MBE) and Women Business Enterprises (WBE)

In the table below, indicate the number and dollar value of contracts for HOME projects completed during the reporting period.

	a. Total	Minority Business Enterprises (MBE)			f. White Non-Hispanic
		b. Alaskan Native or American Indian	c. Asian or Pacific Islander	d. Black Non-Hispanic	
A. Contracts					
1. Number	132	0	0	0	132
2. Dollar Amount	\$148,100	0	0	0	\$148,100
B. Sub-Contracts					
1. Number	0	0	0	0	0
2. Dollar Amount	0	0	0	0	0
	a. Total	b. Women Business Enterprises (WBE)	c. Male		
C. Contracts					
1. Number	132	35	97		
2. Dollar Amount	\$148,100	\$65,194	\$82,906		
D. Sub-Contracts					
1. Number	0	0	0		
2. Dollar Amounts	0	0	0		

**Part IV Minority Owners of Rental Property**

In the table below, indicate the number of HOME assisted rental property owners and the total dollar amount of HOME funds in these rental properties assisted during the reporting period.

	a. Total	Minority Property Owners				f. White Non-Hispanic
		b. Alaskan Native or American Indian	c. Asian or Pacific Islander	d. Black Non-Hispanic	e. Hispanic	
1. Number	0	0	0	0	0	0
2. Dollar Amount	0	0	0	0	0	0

**Part V Relocation and Real Property Acquisition**

Indicate the number of persons displaced, the cost of relocation payments, the number of parcels acquired, and the cost of acquisition. The data provided should reflect only displacements and acquisitions occurring during the reporting period.

	a. Number	b. Cost				
1. Parcels Acquired	0	0				
2. Businesses Displaced	0	0				
3. Nonprofit Organizations Displaced	0	0				
4. Households Temporarily Relocated, not Displaced	0	0				
Households Displaced	a. Total	Minority Business Enterprises (MBE)				f. White Non-Hispanic
		b. Alaskan Native or American Indian	c. Asian or Pacific Islander	d. Black Non-Hispanic	e. Hispanic	
5. Households Displaced - Number	0	0	0	0	0	0
6. Households Displaced - Cost	0	0	0	0	0	0

**U.S. Department of Housing and Urban Development**  
Office of Community Planning and Development

OMB Approval No. 2506-0171  
(exp. 05/31/2007)

Match Contributions for Federal Fiscal Year (yyyy)	2004

1. Participant No. (assigned by HUD)	2. Name of the Participating Jurisdiction	3. Name of Contact (person completing this report)
M04-SG-01-0100	State of Alabama (administered by Alabama Housing Finance Authority)	Earlene Hayden
5. Street Address of the Participating Jurisdiction		4. Contact's Phone Number (include area code)
2000 Interstate Park Drive, Suite 408		334/244-9200
6. City	7. State	8. Zip Code
Montgomery	AL	36109

100

1. Excess match from prior Federal fiscal year	\$	5,390,980	
2. Match contributed during current Federal fiscal year (see Part III.9.)	\$	1,827,929	
3. Total match available for current Federal fiscal year (line 1 + line 2)			\$ 7,218,909
4. Match liability for current Federal fiscal year			\$ Disaster Waiver
5. Excess match carried over to next Federal fiscal year (line 3 minus line 4)			\$ 7,218,909

1000

[illegible]

loans closed 4/1/04 thru 3/31/2005

HOME Contribution for 2004 Fiscal Year

Disaster Waiver for State of Alabama (2 exceptions Cherokee &amp; Cleburne County)

Project Number	Project Name	Date Project Committed	Project Address	Project Type	HOME Funds Expended	Date HOME \$ Expended	Amount of Match Liability Incurred	Value of Match Contribution	Type of Match	Date Match Recognized	Comments
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)
2000024	Quail Run Apartments	24-Mar-00	33 Quail Run Drive Tallahassee, AL	H/TC	\$427,320.00	17-May-04	0	0	Disaster Area No Match Req	5/25/2004	2004 Match Liability
2001032	YW Homes St. Clair Rental	21-Sep-01	7th Avenue N Pell City, AL	HOME ONLY Funds	\$100,858.00	11-May-04	0	0	Disaster Area No Match Req	5/25/2004	2004 Match Liability
2001033	YW Homes Jefferson Co. Rental	21-Sep-01	7520 6th Avenue South Birmingham, AL	HOME ONLY Funds	\$357,644.00	02-Feb-05	0	0	Disaster Area No Match Req	2/9/2005	2005 Match Liability
2001068	Twin Oaks formerly Decatur Duplex	21-Sep-01	3205 Central Parkway SW Decatur, AL	HOME ONLY Funds	\$152,966.00	02-Jul-04	0	0	Disaster Area No Match Req	7/9/2004	2004 Match Liability
2001070	Meadow Park Apartments formerly Colonial Park Apts	21-Sep-01	2620 Frederick Road Opelika, AL	H/TC	\$1,818,885.00	23-Jun-04	0	0	100% Match Waiver	7/1/2004	2004 Match Liability
2002006	Hickory Trace Apartments	30-Aug-02	138 Hickory Trace Lane Florence, AL	H/TC	\$1,455,243.00	14-Jul-04	0	0	Disaster Area No Match Req	7/21/2004	2004 Match Liability
2002007	Timber Trail	30-Aug-02	1372 Commerce Drive Auburn, AL	H/TC	\$1,182,947.00	13-Sep-04	0	0	Disaster Area No Match Req	9/23/2004	2004 Match Liability
2002014	Cherry Ridge Independent Living Apts.	30-Aug-02	1100 Jeff German Parkway Birmingham, AL	H/TC	\$1,321,890.00	17-Nov-04	0	0	Disaster Area No Match Req	11/18/2004	2005 Match Liability
2002015	Orchard Park Apartments	30-Aug-02	100 Orchard Park Drive Hayneville, AL	HOME ONLY Funds	\$766,823.00	07-Jul-04	0	0	Disaster Area No Match Req	7/12/2004	2004 Match Liability
2002034	Hilltop Apartments	30-Aug-02	300 Hilltop Drive Selma, AL	HOME ONLY Funds	\$1,060,838.00	14-Jun-04	0	0	Disaster Area No Match Req	6/18/2004	2004 Match Liability
2002042	Willow Trace Apartments	30-Aug-02	105 Evin Lane Jackson, AL	H/TC	\$1,264,919.00	11-Jun-04	0	0	Disaster Area No Match Req	6/15/2004	2004 Match Liability
2002048	Olympia Gardens	30-Aug-02	3332 Meridian Street Huntsville, AL	H/TC	\$1,247,500.00	15-Dec-04	0	0	Disaster Area No Match Req	12/16/2004	2005 Match Liability
2002051	Englewood Apartments	30-Aug-02	185 LaRue Finis Leesburg, AL	H/TC	\$591,159.00	17-Nov-04	0	0	Disaster Area No Match Req	11/19/2004	2005 Match Liability

2002057	Brookridge Apartments	30-Aug-02	261 Valentine Street Uzark, AL	HOME ONLY Funds	\$751,397.00	25-Aug-04	0	0	Disaster Area No Match Req	8/27/2004	2004 Match Liability
2002058	Covington Place Apartments	30-Aug-02	1300 U.S. Highway 431 Abbeville, AL	HOME ONLY Funds	\$734,699.00	25-Aug-04	0	0	Disaster Area No Match Req	8/27/2004	2004 Match Liability
2002059	Carrington Way Apartments	30-Aug-02	144 Dr. T. V. McCoo Blvd Eufaula, AL	HOME ONLY Funds	\$734,095.00	25-Aug-04	0	0	Disaster Area No Match Req	8/27/2004	2004 Match Liability
2002060	Black Oak Apartments	30-Aug-02	1000 Bloomfield Street Union Springs, AL	HOME ONLY Funds	\$731,475.00	03-Sep-04	0	0	Disaster Area No Match Req	9/8/2004	2004 Match Liability
2002062	Collier Cove	30-Aug-02	546 Craft Lane NE Hartselle, AL	H/TC	\$1,015,158.00	13-Dec-04	0	0	Disaster Area No Match Req	12/16/2004	2005 Match Liability
2002063	Carroll's Country Crossing	30-Aug-02	600 6th Avenue East Oneonta, AL	HOME ONLY Funds	\$862,823.00	24-Feb-05	0	0	Disaster Area No Match Req	3/3/2005	2005 Match Liability
19					16,578,639	0	0				

# MATCH SURPLUS

98 Sweat Equity	\$ 34,000
98 Volunteer Labor	\$ 484,800
99-2000 Sweat Equity	\$ 49,000
99 Volunteer Labor	\$ 243,900
2000 Volunteer Labor	\$ 388,980
2000 Rehab Balance	\$ 87,167
2001 BMIR	\$ 21,819
2001 Habitat Balance	\$ 284,986
2001 Sweat Equity Balance	\$ 15,000
2001 Volunteer Labor	\$ 145,500
2001-2002 Rehab Assistance	\$ 264,318
2002 Interest Buy Downs	\$ 559,700
2002 Habitat	\$ 678,416
2001-2002 Down Payment	\$ 188,126
2002 Sweat Equity	\$ 40,000
2002 Volunteer Labor	\$ 593,960
2003 Interest Buy Downs	\$ 3,500
	<u>\$ 4,083,172</u>

2003 Habitat	\$ 749,558
2003 Down Payment	\$ 4,068
2003 Sweat Equity	\$ 42,000
2003 Volunteer Labor	\$ 548,300
2004 BMIR-HOME Assisted	\$ 32,694
2004 Habitat	\$ 751,925
Habitat over term corrections	\$ 127,978
Habitat under term corrections	(14,222.31)
2004 Down Payment Asst. - RAMP	\$ 14,239
2004 Sweat Equity	\$ 39,000
2004 Volunteer Labor	\$ 578,790
AHP Grant/Loan - 2003	\$ 249,499.30
AHP Grant/Loan - 2004	\$ 11,908.12
2005 Habitat	\$ 246,764.97
2005 Down Payment	\$ 4,397.94
2005 Sweat Equity	\$ 13,000.00
2005 Volunteer Labor	\$ 225,200.00

Surplus total through 3/31/2005

\$ 7,708,272

7,218,909.11

NO 8/21/3/05

<b>Summary of Housing Accomplishments</b>	
<b>Name of Grantee:</b> State of Alabama	<b>Program Year:</b> 2004
<b>PRIORITY NEED CATEGORY</b>	<b>ACTUAL UNITS</b>
<b>RENTERS</b>	
0 - 30% of MFI	179
31 - 50% of MFI	232
51 - 80% of MFI	87
Total	498
<b>OWNERS</b>	
0 - 30% of MFI	13
31 - 50% of MFI	22
51 - 80% of MFI	104
Total	139
<b>HOMELESS</b>	
Individuals	
Families	
Total	0
<b>NON-HOMELESS SPECIAL NEEDS</b>	
Total	245
<b>TOTAL HOUSING</b>	637
<b>TOTAL 215 HOUSING</b>	510
<b>TOTAL HOUSING</b>	
<i>Hispanic</i>	3
<i>Non-Hispanic</i>	
<i>White</i>	374
<i>Black</i>	286
<i>Native American</i>	0
<i>Asian/Pacific</i>	0
<i>Other</i>	2
<b>Total Racial/Ethnic</b>	665